

**Phoenix Program  
Process Definition – Purchasing Module**

Process	<b><i>Purchase Order Amount Approval</i></b>
Process Number	<b><i>PO – 010</i></b> <i>Revised 8/7/00</i>

***Description of Process***

This process describes the review and approval of a Purchase Order for agencies using the PeopleSoft approval process.

***Input to Process***

PO's in a "Pending Approval" status.

***Output of Process***

Approved, Denied or Recycled Purchase Orders. Denied and Recycled PO's remain in a "Pending Approval" status.

***Service Level Agreement Required? (if yes, provide a brief description)***

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***PeopleSoft Panel Groups being Used***

Function	Panel Group
PO Approval	PO Amount Approval

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### ***Business Process Description***

<b>Process Description</b>	<b>Responsibility (Agency/Centralized)</b>
Step 1: Navigate to the Manage Purchase Orders menu (Go, Administer Procurement, Manage Purchase Orders).	Agency Approver
<p>Step 2: Display the list of Purchase Orders in “Pending Approval” status (Use, Amount Approval, Approval).</p> <p>In the dialog box displayed, key the “Origin” code for which the Agency Approver has approval authority, or leave this field blank if authorized to approve for multiple origins.</p> <p>Click OK.</p> <p>Review the list displayed and select a PO for approval that is within approver’s dollar authority range.</p>	Agency Approver
<p>Step 3: Review data displayed on the “Approval” panel (buyer name, PO date, PO Reference, PO merchandise amount and PO total value).</p> <p>Go to the “Details” panel to review further detail.</p>	Agency Approver
<p>Step 4: On the “Details” panel, clicks on the “magnifying glass” button to display line descriptions, quantities, and amounts.</p> <p>Review the data.</p>	Agency Approver
<p>Step 5: Return to the “Approval” panel and selects an “Approval Action” of “Approve”, “Deny”, or “Recycle”.</p> <p>If denied or recycled, enter a reason for denial or recycle action in the “comment” field.</p> <p>Note: Generally, “Deny” is used if the PO is to be canceled, and “Recycle” is used if the PO needs correcting.</p>	Agency Approver
<p>Step 6: Save the panel.</p> <p>Repeat the process for other PO’s requiring amount approval.</p>	Agency Approver

### ***Forms Used with Process (#)***

\*\*Attach sample form(s)

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***Process Flow Diagram (if appropriate):***

A large, empty rectangular box with a thin black border, intended for a process flow diagram. It occupies the central portion of the page below the title and above the footer.